![Georgia Procurement Conference — Procuring Georgia's Future — DOAS GPC logo]

How to Hit a Homerun with Your IT Procurements

Today's Play-by-Play Announcers

- Nancy Parrott
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  - Georgia Technology Authority/EMPO

- Jan Pytelewski
  - Director, Agency Sourcing Group
  - DOAS/State Purchasing Division

Pre-Game Report – Injury Updates

- (47%) of state CIOs expressed negative outlooks on IT procurement processes. NASCIO February 2016 Report

- Traditional public procurement processes don't work in an era of startups and rapid technological change. Supplier viewpoint from Governing Magazine article February 2017

- State and local agencies want to buy new technology, such as analytics, but the only firms that can sell it are the handful of big ones that have the money and resources to navigate *government's arcane procurement rules*. Governing Magazine March 2017

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Pre-Game Report – Starting Conditions

According to a Center for Digital Government article, the challenges of the IT purchasing process include:

- Complex projects that involve multiple products and services

- Lengthy and complex RFPs that reflect equally lengthy and complex requirements

- Vendors with limited experience as government suppliers

- Overlapping or conflicting terms/conditions from funding sources

Pre-Game Report – Starting Pitcher

Whether your organization is spending $100,000 for a utility player (i.e., purchasing the development of a mobile app) or spending $100,000,000 for a superstar (such as a brand, new Medicaid management system), we all can be better prepared for the big win…an awarded RFP and a successfully deployed system!

Game Day Plan: Identifying the Field of Play

Which of these solicitations have an IT component?

? Transportation Scheduling and Dispatching System

? Project Management Software

? Dining Services

? Pharmacy Benefits Management Services

? Dental Benefits

? Athletic Clothing

? Annual Charitable Giving Program
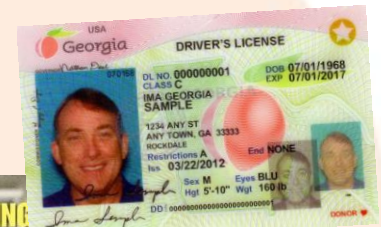
? Drones

? Advertising & Media Services

? Janitorial Services

Major League Definition - Field of Play

Georgia defines an IT investment as:

A commitment of resources (financial, human, material) to any product or service that consists of, or relies upon, information technology to capture, process, store, share or otherwise manipulate data that is managed by a state entity.

Game Day Plan – Know Your Signals
Understanding the Procurement/What Are You Buying?

- Data-Sharing
- Mobile
- Analytics
- Networked
- Appliance
- COTS
- Integrated

- Web
- Cloud
- Portal
- Device
- Development
- Platform
- Interface

Today's Player Line-Up
Successful IT Procurements Begin with a Winning Team

- Procurement Officer
- Chief Financial Officer/Financial Director
- Bench Players
  - Legal Support
  - Project Manager

- IT Department/CIO or IT Director
- Chief Security Officer
- Business Owner/Program Manager

Play Ball – Throwing the Right Pitch

- What type of information is being captured?
    - Open Records
    - PII
    - HIPAA
    - FERPA
    - Public Safety
- Where is data currently kept?
- Who uses the data?
- Is the data being shared internally/ externally?
- Do we have retention policies for length of storage?

Play Ball – Getting on First Base

Suppliers "NEED to KNOW"

State requirements:

- All data must reside in the US
- Employees must undergo background checks
- Appropriate security protocols must be in place (see Extra Innings)

Play Ball – Getting on First Base

Suppliers "NEED to KNOW"

- Scope specifics:
  - Current environment
  - Volume (transactional, storage, growth)
  - Other entities involved
  - Disaster Recovery*
  - Contract termination*

Play Ball – Stealing 2nd Base

Suggested RFP Questions

- Qualification
    - Supplier – Ask What
    - Resources – Ask Who

- Requirements
    - Developing – Ask How
    - Off-the-Shelf – Ask What

- Implementation Approach – Ask When, Where, What & Why

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Batting Clean-Up

Think	Discuss	Know/Understand
Through elements of cost proposal	Support requirements with teammates	Likely exceptions and Supplier's position

Finalizing the Request-for-Proposal

Hitting a Home Run!

HB 676

- New state law
- IT purchases over $1MM
- Business justification
- Organizational change management
- OPB and GTA

https://www.youtube.com/watch?v=ecl7vJf_90o

Play Ball – Extra Innings

Hosting Services
SaaS
Cloud

- **Types of security**
  - Data
  - Facilities
  - Personnel
- **Reporting**
  - FISMA
  - 3rd party audits
- **Breaches**
- **Risk acceptance**

Play-by-Play

Good Offensive Plays	Good Defensive Plays

▪ Know the Opposition/Marketplace
  - Request for Information
  - Request for Qualified Contractor
  - Post Draft RFP for comments
  - Conduct demonstrations
  - Conduct software trial
▪ Require all contract documents that a Supplier expects you to consider to be included in their RFP response
▪ Include teammates on any discussion/negotiations of Statements of Work
▪ Avoid payments upfront
	▪ Watch for words
	  - Endeavour
	  - Assist
	  - Support
	  - Facilitate
	  - Help
	▪ Avoid striking out
	  - Use of test environments in demos
	  - Promise to release a function/feature in next release
	▪ Consider Total Cost of Ownership (TCO)

Which League Are You In? Rules of the Game

National League	American League	Independent League	
(Elected Official agencies)	(Executive Branch agencies)	(USG, Authorities/Municipal Govt.'s)	
Department of Education	Department of Administrative Services	University System of Georgia	
Secretary of State	Department of Community Health	Lake Lanier Islands	
Department of Labor	Georgia Bureau of Investigation	Courts	
Department of Agriculture	DBHDD	City of Atlanta	
Public Service Commission	State Roads and Tollway Authority	Fulton County	
Georgia General Assembly	Department of Human Services		
Office of Insurance Commissioner	Georgia Lottery		

Batting Practice
How to Improve your Game!!

Coaches

DOAS Agency Sourcing Group

GTA Enterprise Project Management Office

Chief Information Officers

State Chief Technology Officer

State Portal Group

Umpire's Guides

- Georgia's Enterprise IT Policies, Standards and Guidelines (PSG's)
- IT procurement checklist
- Business case template and RFP Examples
- Procurement guide from the Center for Digital Government
- Description of State's data center services and responsibilities
- Project assurance and scheduling guidelines
- USG IT procurement guidelines

Post-Game Wrap-Up

Any Questions from the Press?